



## Women's State of the Media Democracy 2011

International research center into  
media habits and interactions

*Understanding women's habits*

**Women's forum - October 13 to 15, 2011**



# Presentation of the “*State of the Media Democracy 2011*” study

- **Fifth edition of the International Research Center into media habits and interactions**, "State of the Media Democracy" performed by Deloitte Research, the Deloitte global TMT Research Center.
- A multi-national study across 6 countries: Brazil, United States, Canada, France, Germany and Japan. This is the first time the study has been performed in France.
- The aim of the study is to obtain data and on how **male and female consumers aged between 14 and 75** are interacting with technology and media and what there preferences might be for the future.
- **Methodology:**
  - 14,063 individuals interviewed on-line during the 4<sup>th</sup> quarter 2010,
  - Recruitment from the Survey Sampling International (SSI) panel.
  - Sample representative of the geographic and economic profile of French internet users, with sex quotas and 5 age brackets (14-17, 18-29, 30-44, 45-60, 60-75).

# How do women use the media?

## Contents

- Favorite media of men and women: TV, Internet and Press
- Media habits
  - Television: multi-tasking and less delinearized consumption
  - Press: printed press still ahead of its online counterparty
  - On-line activities and Web 2.0: women communicate and participate more in social networks
  - Mobile phones / Smartphones: women's alter ego
- Impact on e-commerce: women easily influenced by recommendations
- Appendices and figures

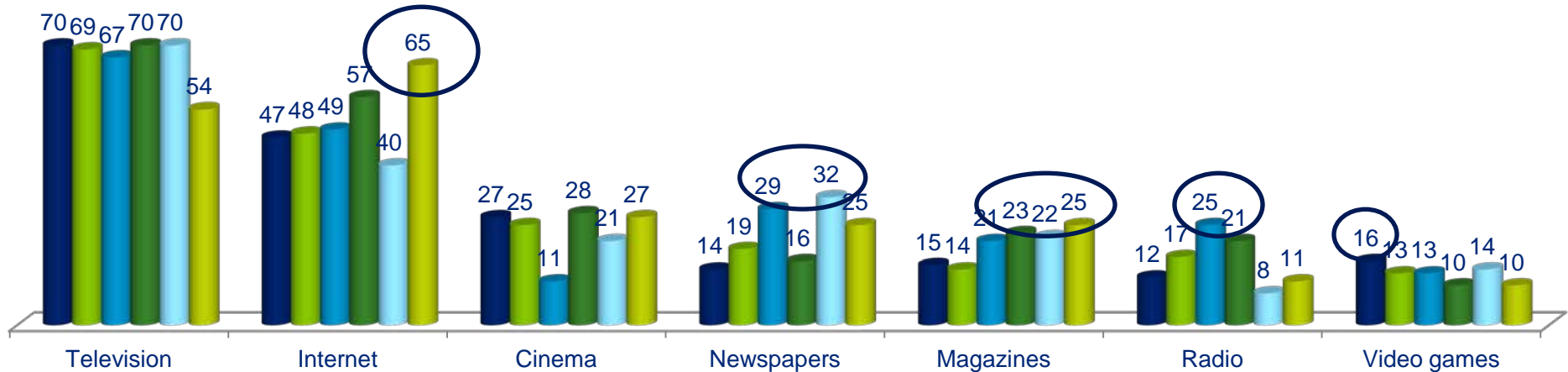
# Favorite media of men and women: TV, Internet and Press



# Women's favorite media: each country has its own preference

### Top 3 Favorites - % rank

■ US ■ Canada ■ Germany ■ France ■ Japan ■ Brazil



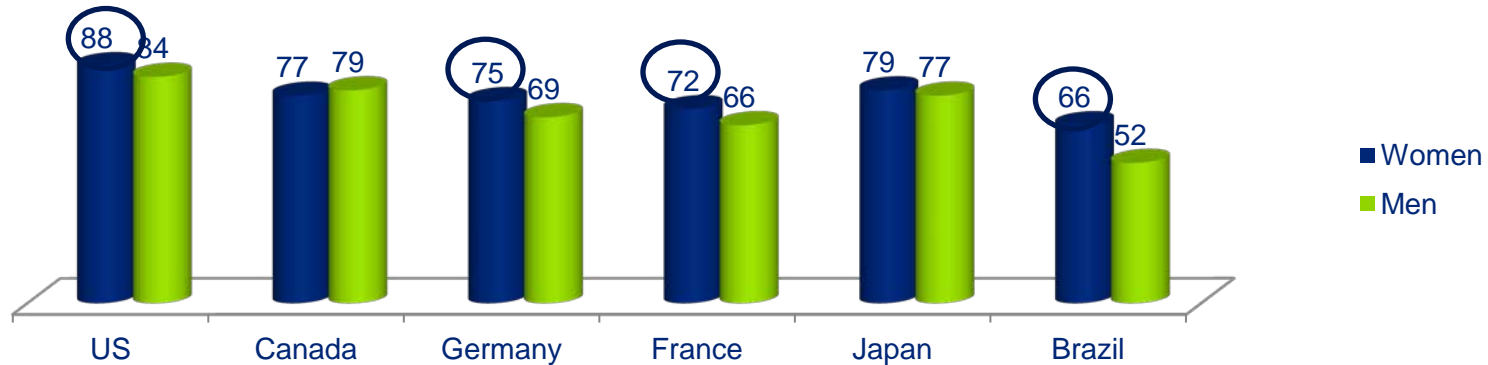
Women	67%	51%	23%	23%	20%	16%	13%
Men	68%	49%	22%	28%	19%	20%	25%

- TV remains the most favored media source of women across all countries, except Brazil where women prefer the Internet
- Brazilian and French women are most attached to the Internet. They are also attracted by the magazine press, while Japanese and German women prefer newspapers
- German women remain the most attached to the radio
- Video games are ranked highest by American women

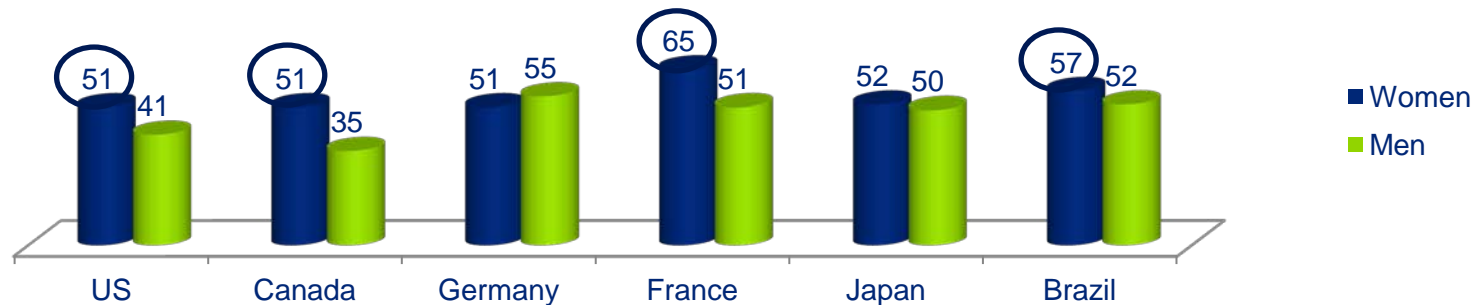


# Women are most influenced by television and the magazine press

### Influence of television - % Top 3



### Influence of the magazine press - % Top 3



The influence on women of magazine advertising is close behind that of television in France and Brazil. **The favorite media sources of women also have the greatest influence on their purchasing decisions.** French women stand out by their greater sensitivity to printed media (newspapers, magazines and billboards). Japanese and Brazilian women are more heavily influenced by mobile phones/smartphones.

# Media habits

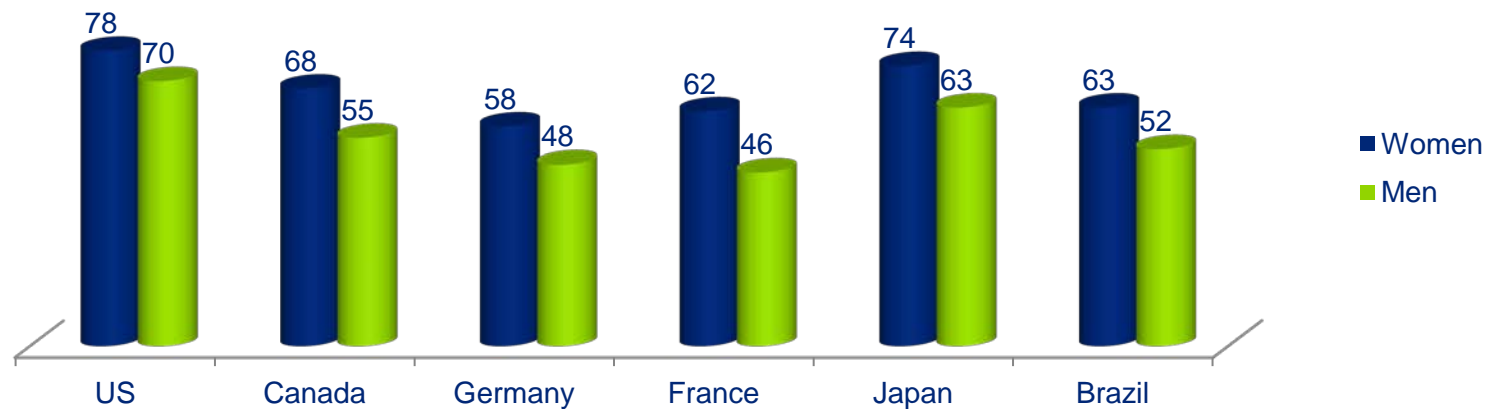
Television:  
multi-tasking and less delinearized  
consumption



# Women multitask more than men, across all countries



Multitasking while watching TV - %

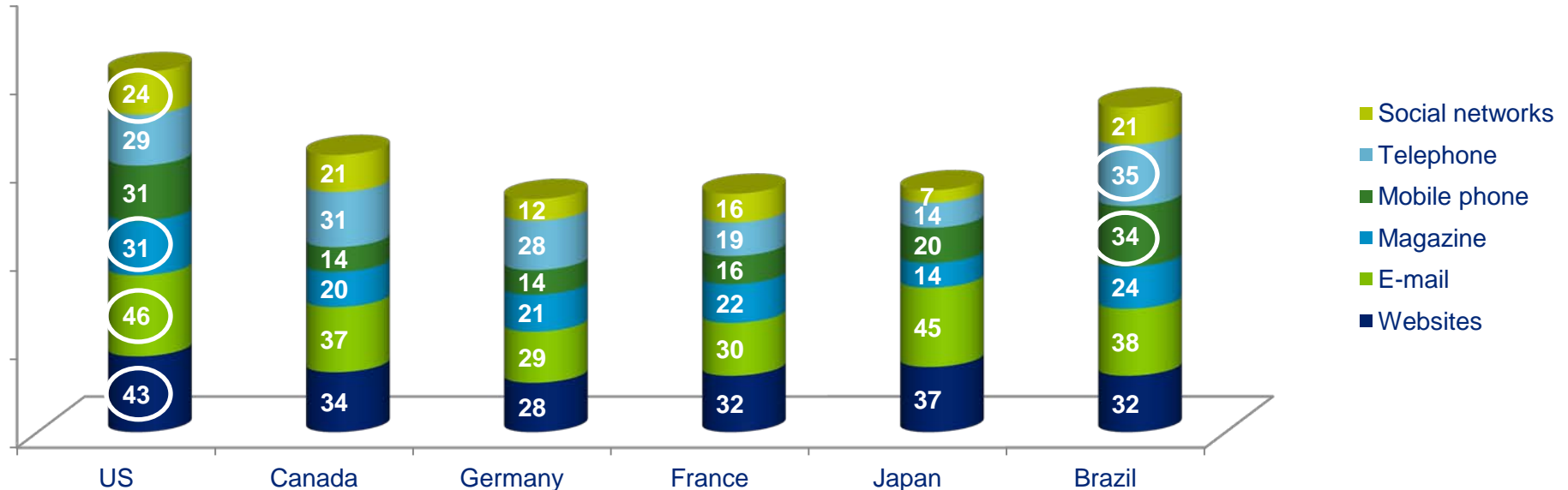


- Women multiply simultaneous media activities more than men, across all countries. Watching TV is not an exclusive activity for the majority of women and the difference between the sexes is most marked in France.

# Female multitasking most diversified in the US and Brazil



% Activities performed while watching TV



- Among women, Americans and Brazilians are the biggest multitaskers : e-mails, websites and social networks for Americans and mobile phones and the telephone for Brazilians.
- Japanese women focus more on e-mails.
- Social networks are also visited while watching TV by 21% of Canadian and Brazilian women.

# Women plebiscite the DVR and its functionalities, especially Americans and Brazilians



	US		Canada		Germany		France		Japan		Brazil	
	F	M	F	M	F	M	F	M	F	M	F	M
Watch when it suits me	71	65	70	68	47	42	37	38	44	41	65	64
Record so as not to miss any episodes	70	63	68	57	45	33	37	34	31	25	60	52
Skip adverts	68	60	58	60	37	32	24	18	39	23	48	36
Watch a program while recording another	61	58	55	50	38	37	40	36	39	24	55	51
Pause	59	51	49	43	27	22	25	32	35	22	59	51
See more programs even if they air at the same time	55	45	45	42	32	29	24	18	39	23	48	36
Archive and organize my programs	28	24	25	25	28	25	18	19	33	26	56	46

- Women, more than men, appreciate the functions offered by DVR, especially in the US and Brazil. DVR offers freedom in choosing one's hours and the ability to skip adverts, pause programs and avoid missing favorite programs.

# Television – Monography by country (% and points differential vs Men)

	US	Canada	Germany	France	Japan	Brazil
TV Multitasking	78% +8 pts E-mail, websites, magazines, social networks	68% +13 pts	58% +10 pts	62% +16 pts	74% +11 pts E-mail	63% +11 pts E-mail, mobile and landline telephone
Online share	24%	37% +11 pts	19%	19%	12%	38%
Choice of live TV	77%	73%	56%	82%	69%	74%
Preference DVD	67% +6 pts	59% +4 pts	61% +9 pts	48% +4 pts	41% +5 pts	34%

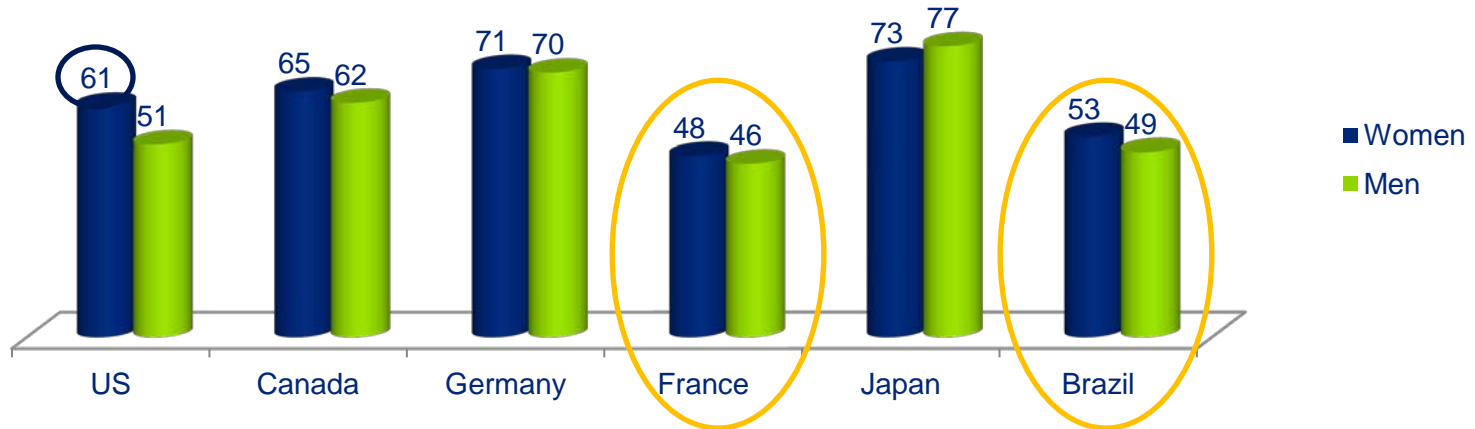
- Television remains the favored media source of women for watching programs, particularly in France. It is in **Brazil and Canada** that women use the internet most to watch TV programs.
- Japanese women remain highly focused on the traditional media source.

Press:  
printed press still ahead of its  
online counterpart

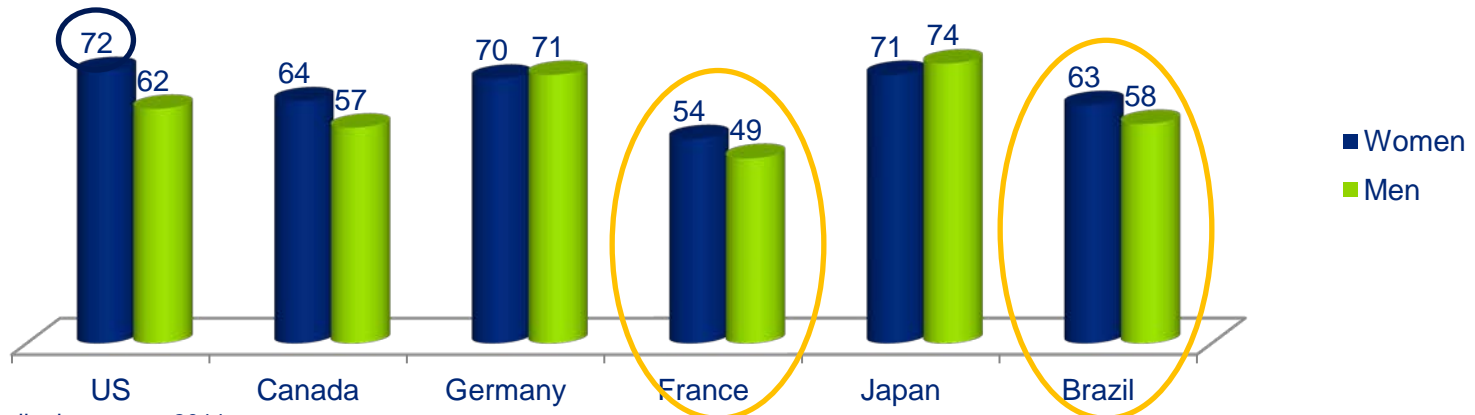
# The printed press remains the favorite press source, especially for Americans; however, it is losing ground in France and Brazil



Preferred method of reading your favorite newspapers: % print



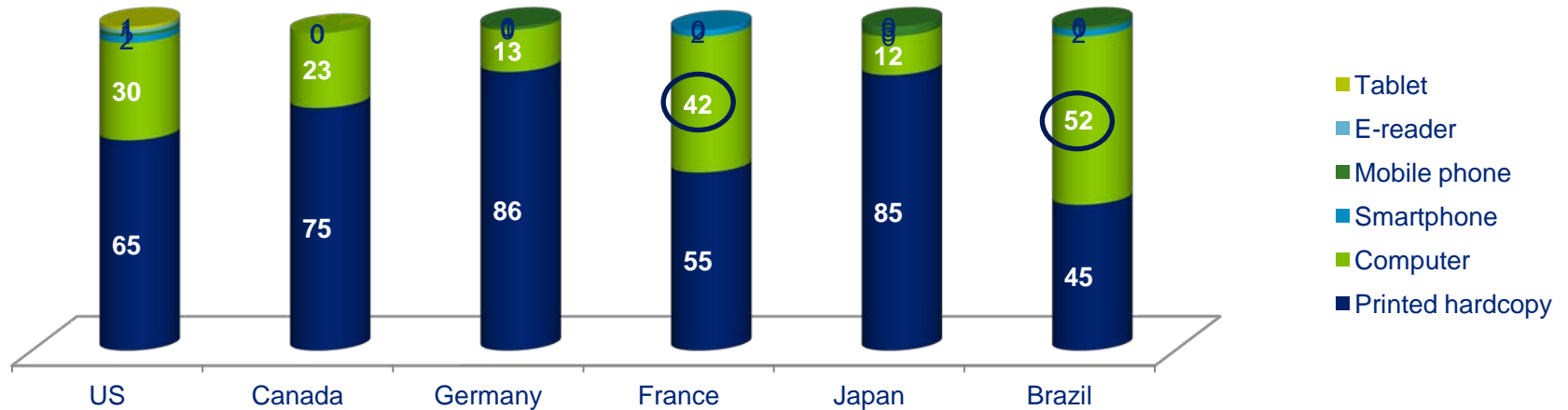
Preferred method of reading your favorite magazines: % print



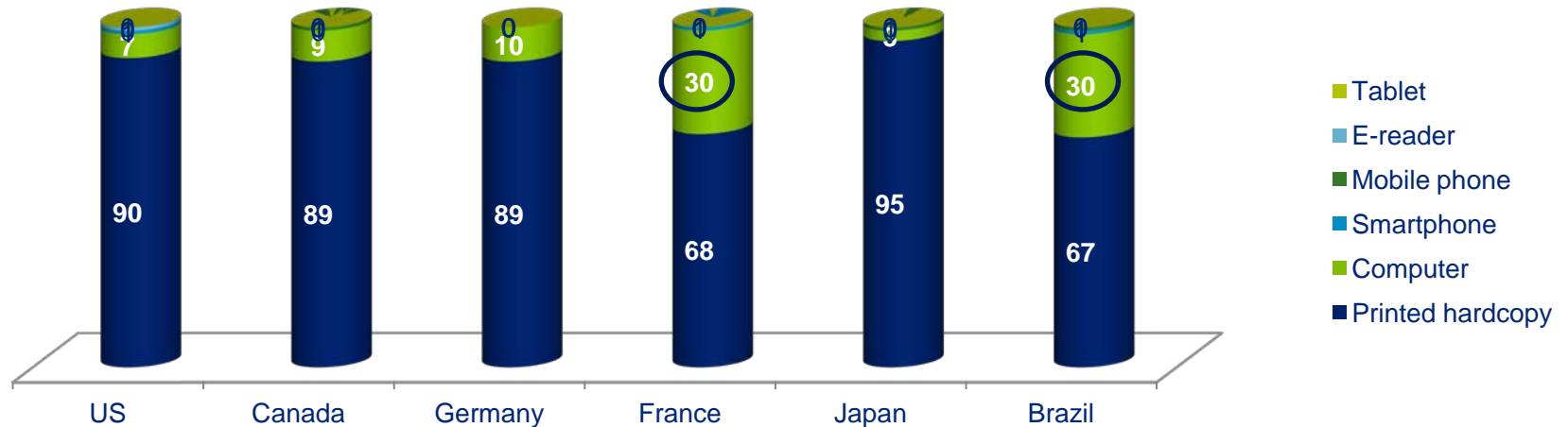
# Online reading favored by Brazilian and French women



Preferred method of reading your favorite newspapers - %



Preferred method of reading your favorite magazines: %



- The majority of Brazilian women choose to read newspapers on their computer, while 30% of French women choose to read magazines online.

# Women like the printed press, even for advertising



% in agreement	US		Canada		Germany		France		Japan		Brazil	
	W	M	W	M	W	M	W	M	W	M	W	M
I like to read printed copies of magazines even when I know the same information is available on-line	77	69	74	66	70	69	78	71	58	58	81	75
An important service provided by printed copies of magazines is advertising, which helps me discover new products for me and my family	60	50	57	54	42	40	54	52	67	64	72	67
I pay greater attention to advertising in printed copies of magazines than those on the internet	66	54	61	57	54	53	54	49	36	37	50	51

- Women generally prefer to read printed copies of magazines (except in Japan).
- Among the advantages of the printed media, advertising is ranked high and is appreciated as it enables new products to be discovered.
- American, Canadian and French women pay closer attention than men to printed advertising than online advertising.

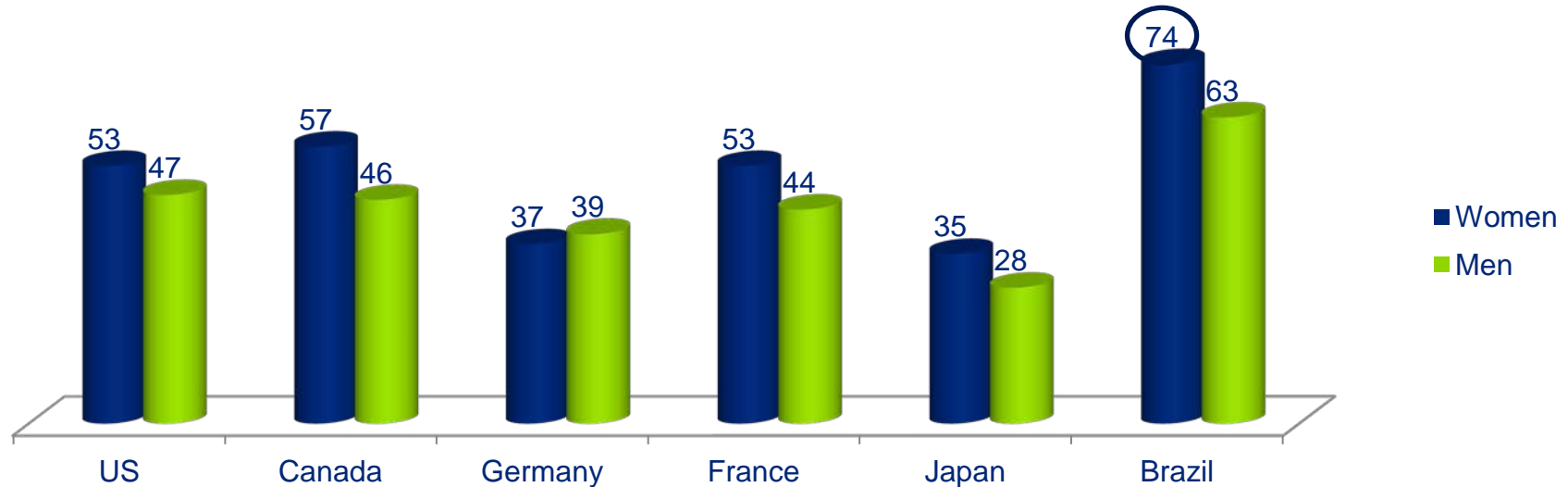


# Online activities and Web 2.0: women communicate and participate more in social networks

# Women like communicating online !



E-mailing friends and family - % who email daily or almost daily



- Across all countries, women communicate daily more often than men, emailing friends and family. This phenomenon is even more common in Brazil, Canada and France.

# Women demand less than men in terms of technical performance – except in Brazil



% in agreement	US		Canada		Germany		France		Japan		Brazil	
	W	M	W	M	W	M	W	M	W	M	W	M
<b>Speed</b>												
Willing to pay more for faster internet service	48	53	37	46	20	33	29	41	28	43	77	75
I would watch more videos if the connection and download speed were faster	47	54	43	55	19	33	47	59	61	70	83	86
<b>TV connection</b>												
I would like to easily connect my TV to the internet in order to watch videos and download content to my TV	58	64	53	67	39	53	62	72	43	63	84	87
<b>Internet targeting</b>												
I would click more often on adverts if they reflected my needs	45	46	38	46	26	31	41	43	73	77	78	80
I would like to have a tool to discover online content relating to my preferences	50	56	45	54	44	49	59	67	60	70	87	86

- Whether with respect to technological progress improving the Internet connection speed, connecting the TV to the internet or effective targeting, women are less concerned than men across all countries, except in Brazil where the expectations of women are at the same high level as those of men.

# Brazilian women are more active and participate more on the Internet



Frequency of use %	US	Canada	Germany	France	Japan	Brazil
<b>Participation</b>						
I give my opinion on websites, blogs and e-commerce sites	28	13	15	24	20	42
I add comments on new articles or interesting stories I read on the internet	26	23	13	23	13	39
I contribute to blogs by posting comments	22	17	10	19	26	29
I micro-blog	13	11	4	4	12	32
I keep my own blog	11	9	6	10	26	20
<b>Upload</b>						
My photos to a file-sharing site	36	23	8	12	6	48
My videos to a file-sharing site	12	9	4	9	4	26
My video game content	9	10	2	5	5	25

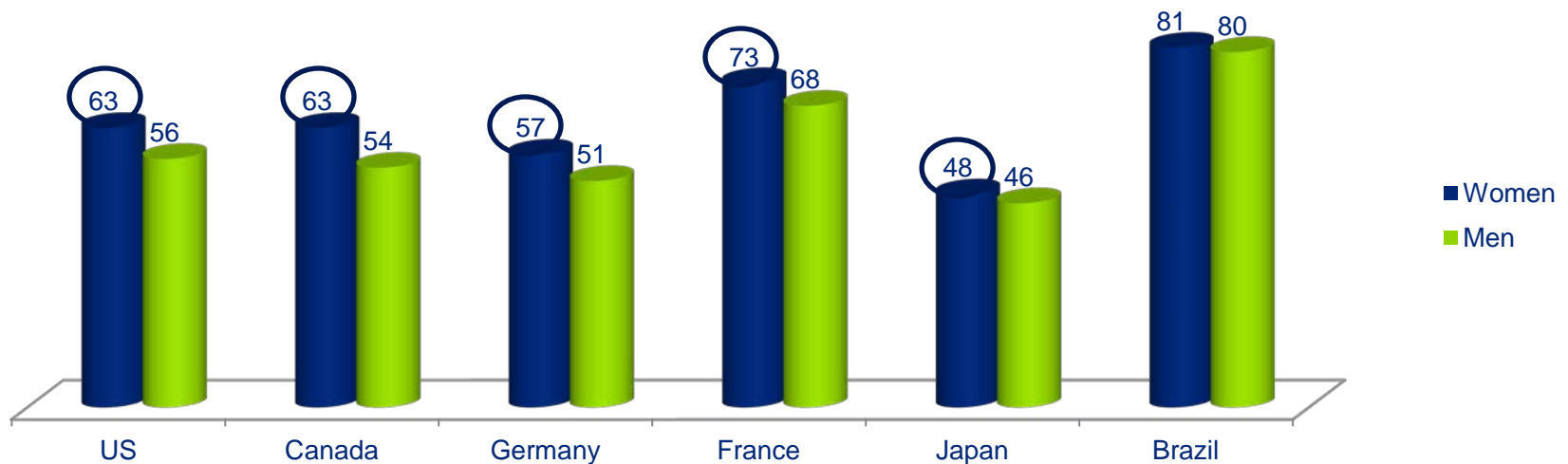
29% men

35% men

# Women are fans of digital communication, especially in France



I think that social networks (Facebook, MySpace, Twitter, etc.), instant messaging and texts are excellent ways of contacting my friends

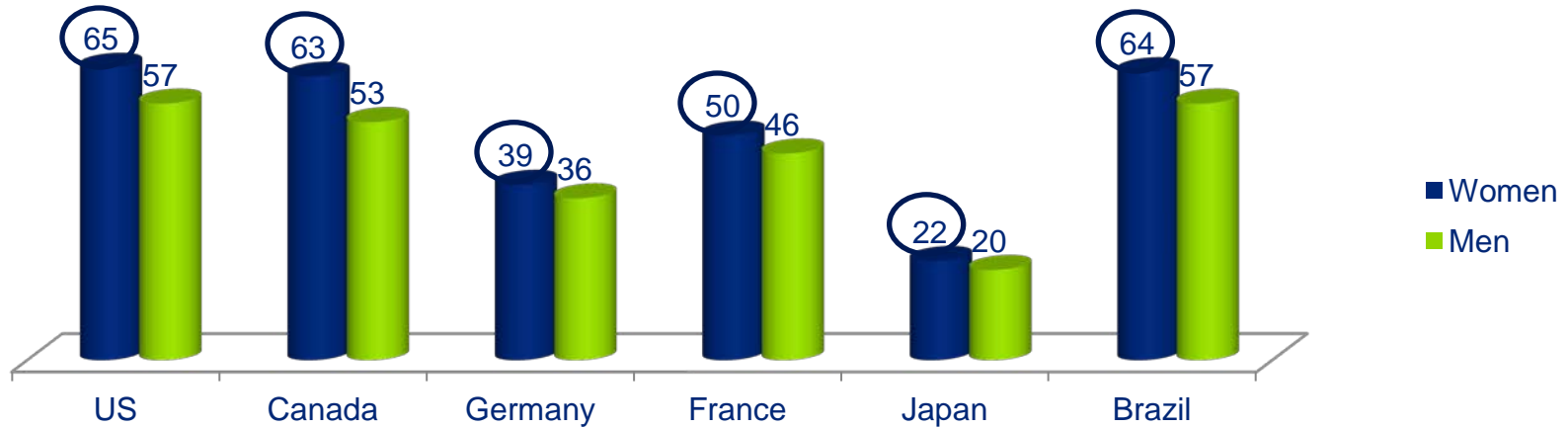


- More generally considered a good way of contacting and communicating with others by women – social networks, instant messaging, and texts – these tools have already been adopted by Brazilians.

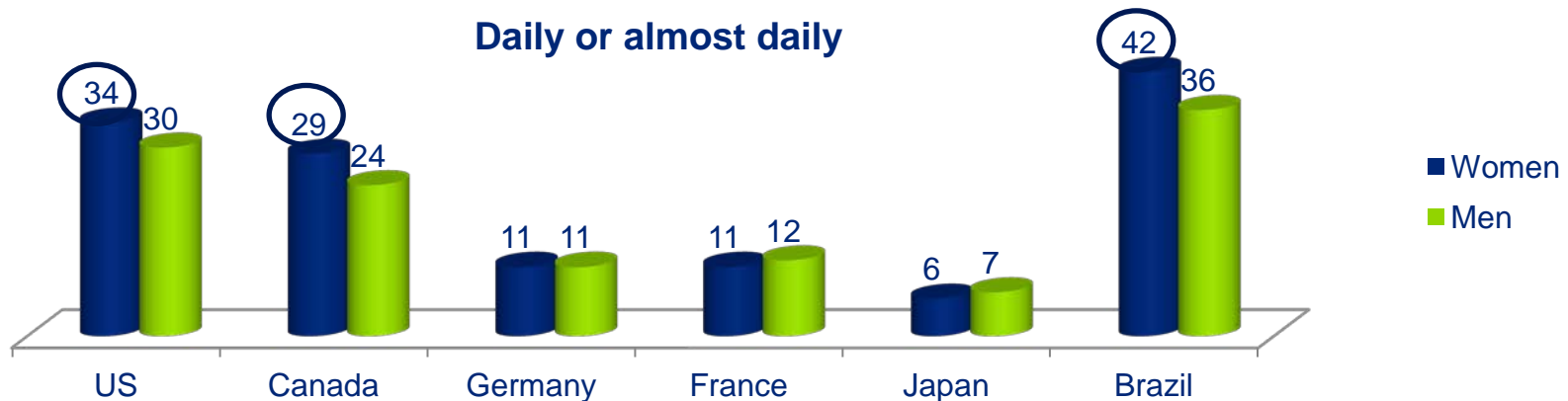
# Women are more involved in social networks



## Regularly update your social network



## Daily or almost daily

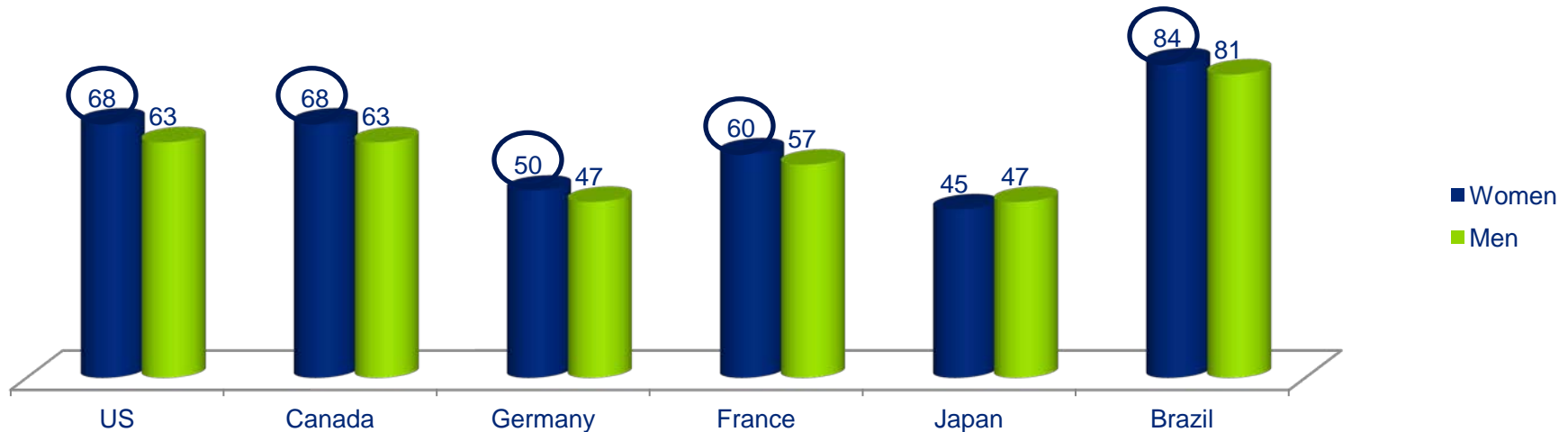


- Women are bigger fans of social networks. Brazilian women are also the most active and participate the most in Web 2.0, followed by American and French women.
- Among online activities, only social networks show a difference between male and female use. Women more regularly update their network, particularly in Canada, Brazil and the US, with 42% of Brazilian women updating their network daily.

# Women addicted to social networks, particularly in Brazil



In my opinion, the main value of social network sites (Facebook, MySpace, Twitter, etc.) is the opportunity they offer me to interact (more frequently) with a greater number of friends than would be possible off-line.



- Brazilian women contribute the most to social networks, followed by American and French women.

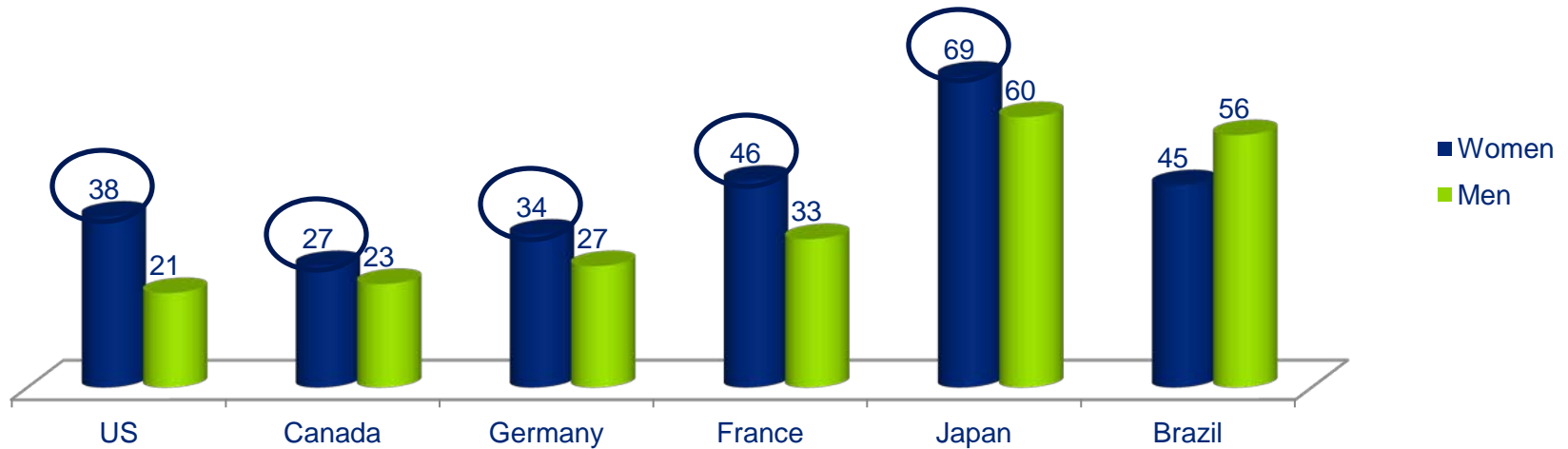
# Mobile phones / Smartphones: women's alter ego



# The mobile phone, the alter ego of women and especially Japanese women



Importance of media – Top 3 rank % mobile phones

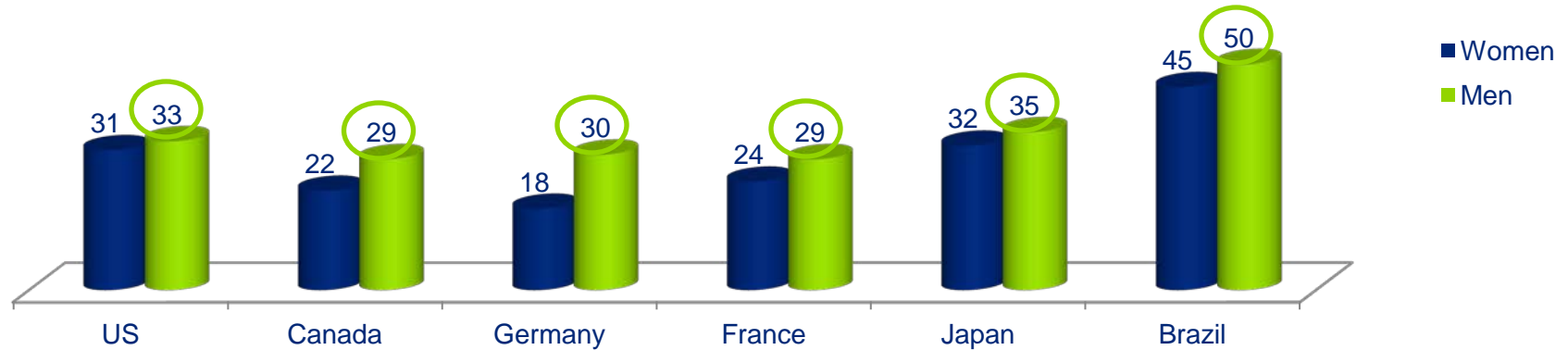


- The mobile phone is ranked more important by women than men in all countries, except Brazil.
- This trend is even more marked in Japan
- Women continue to use text services more than the Internet on mobile phones; particularly German women

# An entertainment media for men

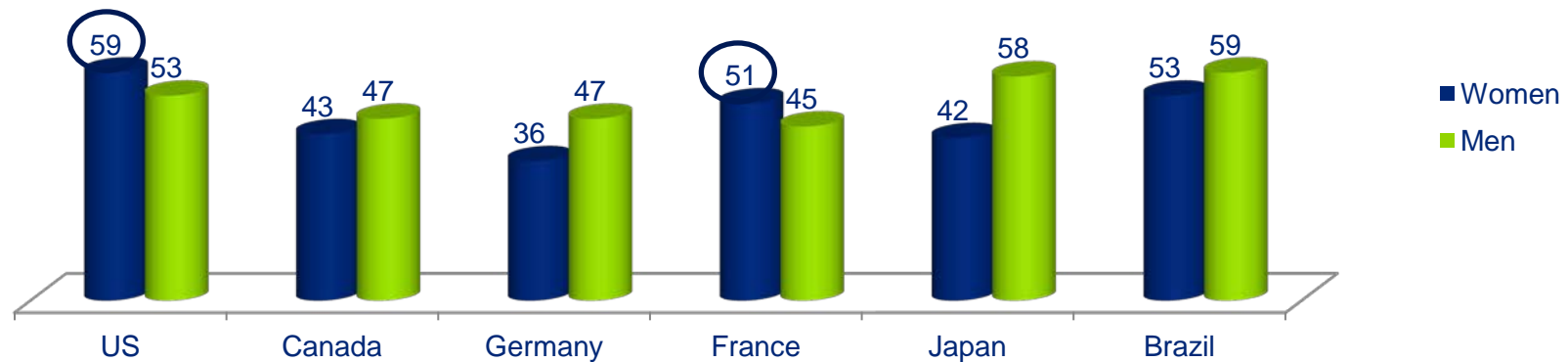


I use my mobile phone / smartphone as an entertainment media - % in agreement



- Across all countries, men consider their mobile phone as a source of leisure and entertainment more than women.
- It is in Brazil and the US that women most use communication and photo functions. However, it is in Japan that women most use their smartphone for entertainment and where information searches, downloading and e-commerce is the highest.

# The smartphone replaces the laptop when on the move

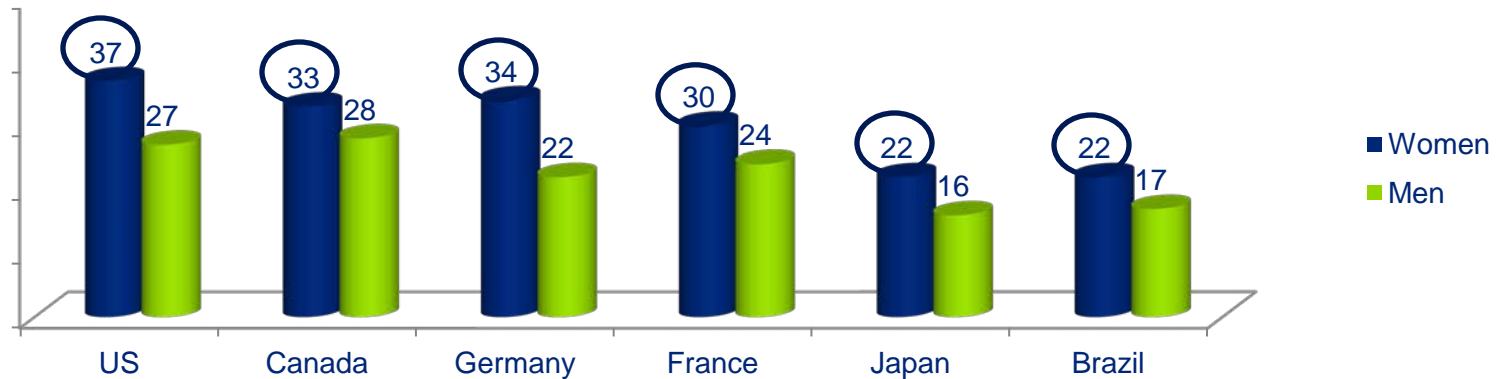


- The smartphone is destined to replace the laptop when on the move - more so for men than women, except in the US and France.

# The style of the mobile phone is the number one purchase criteria for women when buying a smartphone



Important purchase criteria – Top 3 rank % “style”



- Among smartphone purchase criteria, the style of the mobile phone is exclusive to women; esthetic value remains a female preference, even in new technologies!

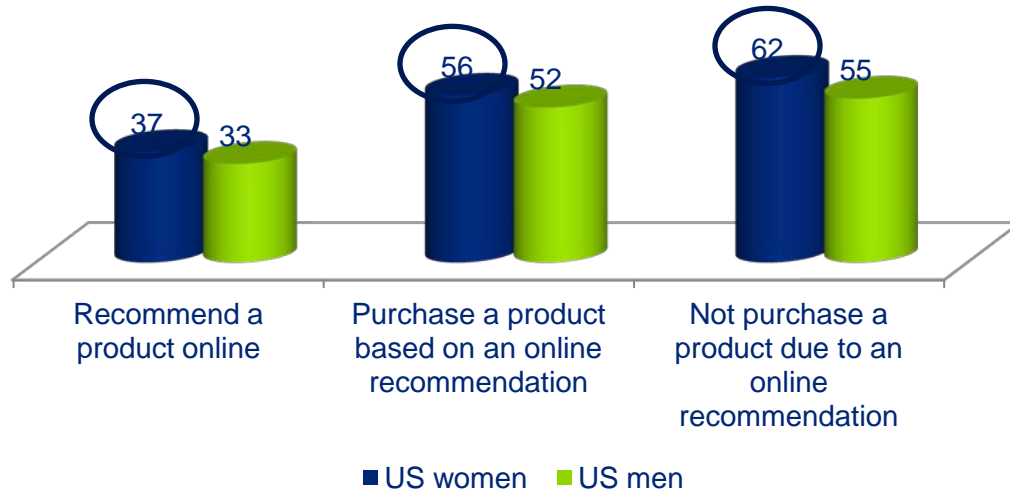
Impact on e-commerce:  
women easily influenced by  
recommendations

# E-commerce – Brazilian women are highly sensitive to peer recommendations

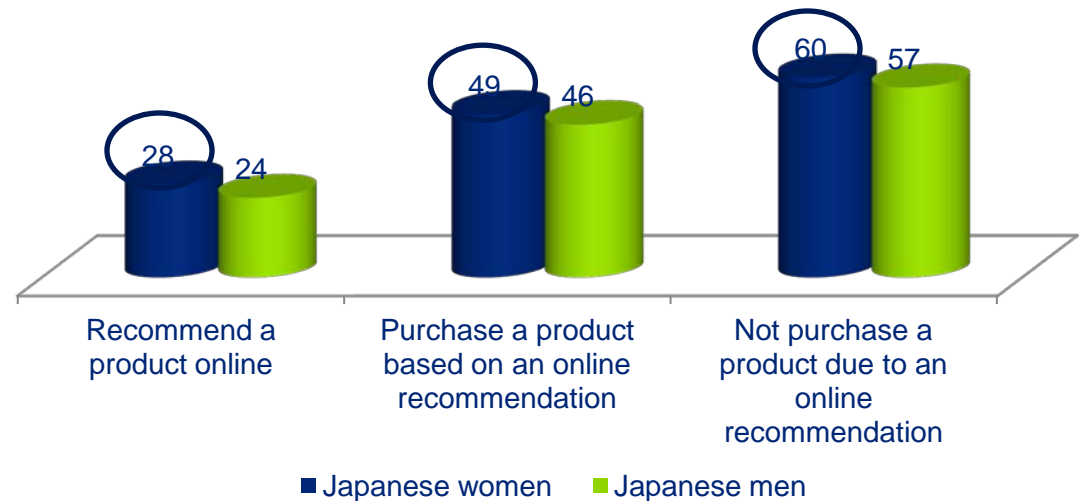


- Brazilian women lead the way in making recommendations and considering these recommendations in their purchase decisions: three-quarters of them base their decisions on consumer opinions.
- They are followed by American and Japanese women, the majority of whom are easily influenced by opinions, more so than men.

# E-commerce – American and Japanese women are more easily influenced by recommendations than men



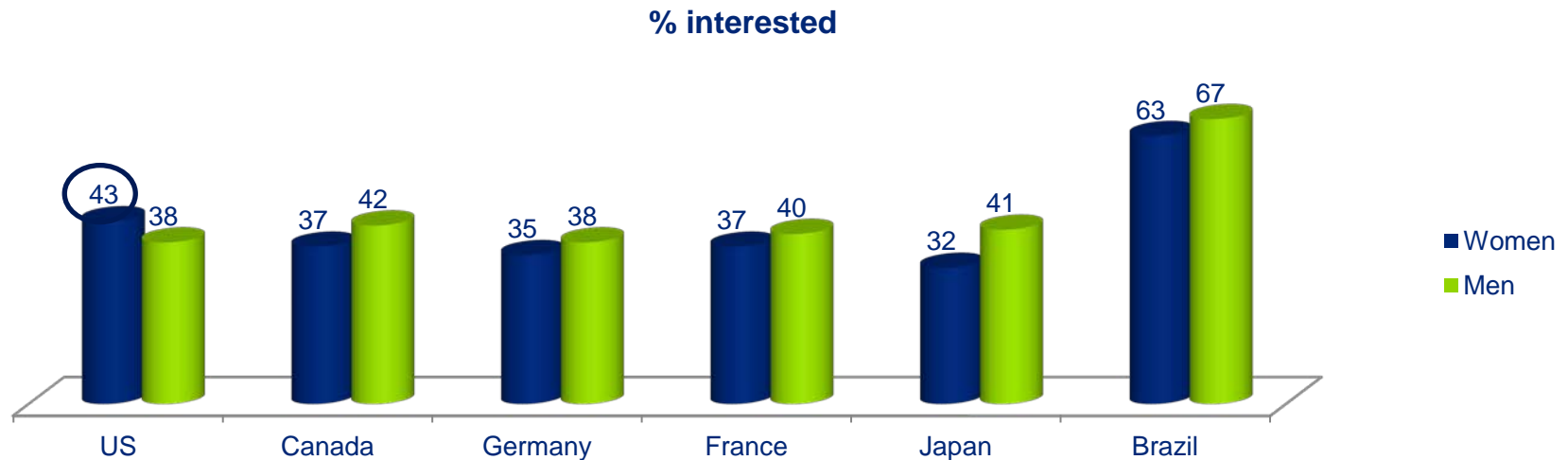
- The majority of women in the US and Japan are also easily influenced by online opinions, more so than men.



# Scanning technology is more attractive to men



In a store, I will be able to access product details (competitor prices, ingredients, plant location, user comments, etc,) by reading the bar code using my mobile phone



- While the desire for information in-store using scanning technology is significant at the point of purchase, it is particularly high in Brazil.
- Only American women stand out from men. In the other countries, men desire equally or more than women the ability to access this information using mobile phone scanning technology.



**Deloitte.**

# Appendices and figures

# Media and advertising – Monography by country (% & points differential vs Men)

	US	Canada	Germany	France	Japan	Brazil
Favored media	TV 70%	TV 69%	TV 67%	TV 72%	TV 70%	Internet 65%
Influential media	TV 88% +4pts vs M	TV 77%	TV 75% +6pts vs M	TV 66% +6pts vs M	TV 79%	Internet 68% +6pts vs M TV 66% +14 pts vs M
	Magazine press 51% +10 pts vs M	Magazine press 51% +15 pts vs M	Magazine press 51%	Magazine press 65% +14 pts vs M	Magazine press 52%	Magazine press 57% +5 pts vs M
Influential online format	Paid search engine optimization 65%	Banners 59%	Banners 54% Organic search engine optimization 54%	Banners 61% +6pts vs M	Paid search engine optimization 69%	Banners 58%

# Press – Monography by country (% & points differential vs Men)

	US	Canada	Germany	France	Japan	Brazil
Prefer printed newspapers	61% +10 pts	65% +3 pts	71%	48% +2 pts	73%	53% +4 pts
Share of newspapers on computers	30%	23%	13%	42%	12%	52%
Prefer printed magazines	72% +10 pts	64% +7pts	70%	54% +5pts	71%	63% +5pts
Share of magazines on computers	30%	9%	10%	30%	3%	30%
Pay closer attention to adverts in magazines than online	66% +12 pts	61% +4 pts	54%	54% +5 pts	36%	50%

# Mobile phone / Smartphone – Monography by pays

(% & points differential vs Men)

	US	Canada	Germany	France	Japan	Brazil
Importance of mobile phones	38% +17 pts	27% +4 pts	34% +7 pts	46% +13 pts	69% +9 pts	45% -11 pts
<u>Share of use</u>						
-SMS	25%	30%	47%	27%	35%	14%
-Internet	12%	10%	5%	11%	28%	23%
Interest in the purchase of a smartphone	41%	36%	35%	48%	57%	82%
Use of smartphones instead of laptops	59% +6 pts	43% -4 pts	36% -11 pts	51% +6 pts	42% -16 pts	53% -6 pts

# The smartphone – a media for sharing and entertainment



% Women frequent users	US	Canada	Germany	France	Japan	Brazil
<b>Communication</b>						
Speaking on the telephone	97	96	96	91	95	96
SMS	73	68	90	89	37	91
E-mail	36	28	13	23	92	38
Social networks	30	23	6	19	20	25
Micro blogging	10	7	2	2	11	9
<b>Entertainment</b>						
Photos	74	63	55	71	83	77
Video camera	44	34	33	39	40	65
Games	35	30	25	32	25	52
Listening to music	32	28	36	42	27	74
Watching videos	22	12	6	15	16	26
Watching audiovisual content	12	7	5	13	18	18

- It is in Brazil and the US that women use smartphones the most for communicating and taking photos
- It is in Japan that women use smartphones the most for entertainment



# The smartphone - a media for obtaining information, downloading and buying

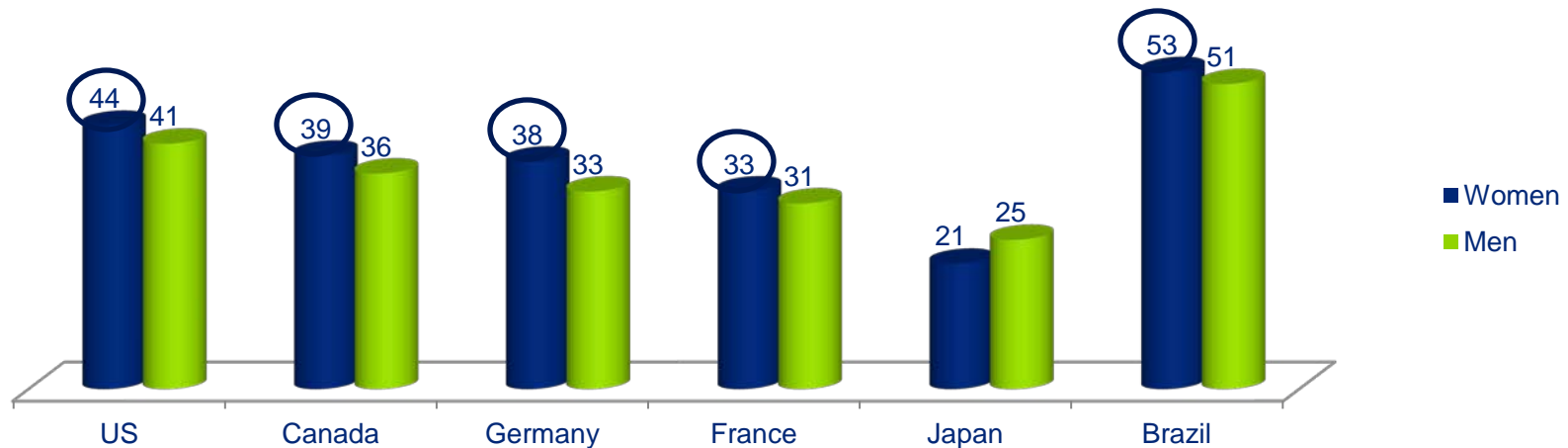
%Women frequent users	US	Canada	Germany	France	Japan	Brazil
<b>Obtaining information</b>						
Accessing the internet	40	30	16	35	62	43
Search engines	33	22	9	14	58	18
Information (news, traffic, weather, etc.)	21	9	9	14	48	21
Using the GPS	23	12	5	14	17	14
<b>Downloading</b>						
Downloading ringtones	31	23	6	14	34	32
Downloading apps	28	19	5	16	28	23
Downloading games	14	10	5	10	15	19
<b>Buying products</b>	<b>11</b>	<b>7</b>	<b>4</b>	<b>9</b>	<b>20</b>	<b>12</b>

- It is once again in Japan that women use the smartphone the most to obtain information, download and for e-commerce
- American women download as many apps as Japanese women
- Brazilian women download more games



# Women place greater value on virtual communication than men, except in Japan

The time spent dialoguing with my friends electronically using instant messaging, texts and social networks (Facebook, MySpace, Twitter), has as much value as time actually spent together.



- The value placed on virtual communication is lower in Japan than France, but achieves a majority vote in Brazil. More women place as much value on virtual communication as face-to-face meetings than men.